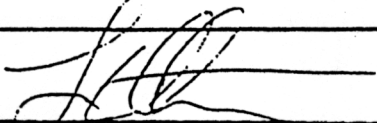


PERSONNEL ADMINISTRATIVE MANUAL
City of San Jose

Subject: GENERAL EDUCATION REIMBURSEMENT	Page 1 of 5	Section Number 8.01
APPROVED: 	Effective Date 07/11/76	Revised Date 07/01/88

8.01.1 PURPOSE

- a. To encourage City employees to further their outside academic professional, and technical education through financial assistance for those courses that enhance career development with the City of San Jose.
- b. To set forth the conditions and procedures necessary to obtain reimbursement for approved educational expenses.

8.01.2 POLICY

a. COURSE SELECTION

- 1 The course work must relate to the employee's present position, must be beneficial to the employee's professional development, or must enhance the employee's career development with the City of San Jose, such as:
 - a. Improving the employee's skills or knowledge as required by his/her present position;
 - b. Preparing the employee for significant technological changes occurring in the career field;
 - c. Preparing the employee for changes in duties due to different assignments of a position or class;
 - d. Preparing the employee for the assumption of new and different duties as a result of a promotional appointment; or
 - e. Preparing the employee for promotional opportunities within the City of San Jose based on a logical educational plan of accomplishment.
2. Courses must be taken for regular academic units of credit from an accredited junior college, college or university.

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POLICY (continued)

For employees in Units 3, 5, 7, and 50, courses can also be taken: (reference Section 15.01 for listing of bargaining/representation units)

- a. For continuing education units (CEU's) from an accredited junior college, college or university
- b. From the San Jose Unified School District Metropolitan Adult Education Program (MAEP).

h. ELIGIBILITY

1. All employees who have completed six consecutive months of full-time service are eligible to apply.
2. Approval must be obtained prior to registration.
3. Course attendance will be on the employee's own time. City time is not authorized for outside education covered by this program. However, the department head will make an effort to adjust work schedules when courses are only offered during regularly scheduled work hours.

c. REIMBURSEMENT

1. Reimbursement of 75% of the cost of registration, tuition and required textbooks will be obtained from the Director of Finance upon satisfactory completion of the course.
2. Unless otherwise stated in the applicable Memorandum of Agreement, or if the employee is unrepresented, reimbursement is limited to a maximum amount of \$300 dollars per fiscal year for any one employee. Exception: The amount paid to any employee represented by Unit 50 shall not exceed six hundred dollars(\$600) in any fiscal year, provided however, that no more than three hundred dollars (\$300) may be applied to continuing education units and/or adult education classes. Educational assistance funds received from another agency or source must be reported. In no event shall reimbursement received from this program, plus reimbursement from other educational incentive programs, exceed the total cost of registration, tuition, and required textbooks. If the total amount of reimbursement from the City and other sources exceeds the total amount of approved expenses, the amount to be reimbursed by the City shall be reduced accordingly.

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3. An employee must receive a letter grade of "C" or better in the class unless the course is given only for units of credit on a pass/fail basis. If a course is given on a pass/fail basis, an employee must receive a "pass."

4. Reimbursement is authorized only for courses involving actual class time course work.

For employees in Units 5, 7 and 50 attending San Jose Unified Metropolitan Adult Education courses, evidence of satisfactory attendance is required for reimbursement.

5. External degree programs in which credit is awarded for life or work experience are ineligible for reimbursement.
6. A maximum of nine units will be allowed for thesis and required project class seminar.

8.01.3 SCOPE

This policy and procedure for general education reimbursement applies to City employees who are participating in undergraduate and graduate studies.

8.01.4 AUTHORITY and APPROVAL

- a. The application for general education reimbursement must be recommended for approval by the employee's department head and approved by the Director of Personnel before beginning any course work. In recommending approval, the employee's department head must verify the relationship between the requested course work and the employee's current or reasonably anticipated assignments with the City of San Jose.
- b. The employee must present to his/her department head, proof of satisfactory completion of the course in order to obtain reimbursement. This documentation may be retained in the employee's personnel file.
- c. Administration of this policy shall be the responsibility of the Director of Personnel.
- d. All Requests for Education Reimbursement and the amounts reimbursable are subject to funds budgeted for Education Reimbursement. Thus, maximum benefits under this policy may be reduced if the funds available become too low to insure equitable participation for all employees.

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8.01.5 PROCEDURE

<u>RESPONSIBILITY</u>	<u>ACTION</u>
Employee	1. Complete in duplicate, Section I of the Request for Education Reimbursement, Form 110-35. 2. Sign application, attach course description, and submit to department head for approval.
Department Head	3. Determine relationship between course work and employee's current position or promotional opportunities with the City. If approved, sign and forward to Director of Personnel. 4. If disapproved, return to employee with explanation.
Director of Personnel	5. Review application: a. Verify employment data and course eligibility during the fiscal year shown on application. Complete Section III. b. If approved, return both copies to department head for subsequent processing of reimbursement voucher. If disapproved, return both copies to department head with reason noted. c. Record disposition of request.
Department Head	6. File approved application pending satisfactory completion of course.

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RESPONSIBILITY

ACTION

Employee

7. Submit transcript or grade slip, instructor's course outline or equivalent, listing of required textbooks and receipt(s) for the cost to department head.

For employees in Units 5, 7 and 50 who are taking San Jose Unified Metropolitan Adult Education Courses: Submit "pass" slip, instructor's course outline or equivalent, listing of required textbooks and receipt(s) for the cost to the department head.

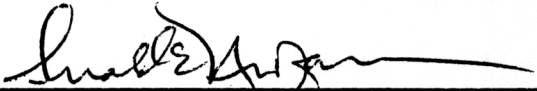
Department Head

8. Complete Section IV and prepare voucher for 75% reimbursement of applicable expenses; attach original approved application and documentation of satisfactory completion (transcript, grade slip, or "pass" slip) and receipt(s) for the cost. Process voucher according to normal voucher procedure.

Director of Personnel

9. Upon request, file updated record of educational accomplishments in employee's personnel file.

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Subject: SPECIAL PROFESSIONAL AND EDUCATIONAL INCENTIVES	Page 1 of 4	Section Number 8.06
APPROVED: 	Effective Date 06/13/79	Revised Date 09/04/85

8.06.1 PURPOSE

To establish a policy and procedure for the payment of specified professional and educational incentives to employees in certain classifications. To identify classifications, licenses and activities for which payment under this section is approved.

8.06.2 POLICY

The policy of the City is to provide incentives to City employees who are incumbents in certain specified classifications to participate in approved professional or educational activities that relate to their jobs. The professional and educational activities and the eligible employees that are covered under this policy are described below:

A. REQUIRED LICENSES AND MEMBERSHIPS

Dues and/or fees that are necessary to maintain licenses or memberships that are required by the minimum qualifications of certain specified classifications are covered. For those employees in Unit 4 (Engineers and Architects), the payment of dues or fees pertains to those required in their professional service. Drivers licenses and similar licenses, not required for professional development, are excluded from this provision.

B. PROFESSIONAL MEMBERSHIPS FOR MANAGEMENT

In addition to the incentive cited above, personnel in Units 04, 21 and 99 are eligible for dues or memberships to be paid for one additional job-related organization.

NOTE: Payment for membership in the additional job-related organization is contingent upon approval of the employee's department head.

C. FIREFIGHTERS EDUCATIONAL INCENTIVE REIMBURSEMENT

Employees represented by the International Association of Firefighters Local #873 (Unit 02) are eligible for an educational incentive in the form of a bonus plan that is supplemental to the General Education Reimbursement Program.

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FIREFIGHTERS EDUCATIONAL INCENTIVE REIMBURSEMENT (continued)

The bonus plan shall consist of a payment of \$20 per semester unit, (quarter units to be computed at two-thirds value of semester units), not to exceed \$120 per fiscal year, for each firefighter who successfully complies with the conditions and procedures that are described under 8.06.4 of this section.

8.06.3 PAYMENT PROCEDURE:

REQUIRED LICENCES, MEMBERSHIP DUES AND PROFESSIONAL MEMBERSHIPS FOR
MANAGEMENT

RESPONSIBILITY	ACTION
Employee	1. Prepare membership form or other request for membership or fees. Include any necessary back-up. Submit to Department Head.
Department Head	2. Approve request. (If Department Head is not sure that the employee qualifies under this provision, check with Finance Department.) 3. If approved, forward to Departmental Accounts Payable section.
Departmental Accounts Payable	4. Prepare payment voucher and forward to Finance Department.

NOTE: Payment requests for membership in an organization which is not required but is job-related must be accompanied by an explanation of the organization's job-relatedness in addition to other required documentation. Payment for membership in the additional job-related organization is contingent upon approval of the employee's department head.

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RESPONSIBILITY

ACTION

Finance Department

5. Verify eligibility of employee and adequacy of documentation.

6. Complete payment process.

8.06.4 FIREFIGHTERS UNIT 02

A. CONDITIONS FOR EDUCATIONAL INCENTIVE REIMBURSEMENT

Courses qualifying for this program will be approved in advance as a group by the City Manager, thus eliminating the need for approval on a course-by-course basis. The Training Officer in the Fire Department will maintain the approved list. In order to qualify for payment, the firefighter must obtain certification from the educational institution involved attesting to his/her successful completion of the course with an academic grade of "C" or better.

Payment will not be made for a repeat course unless the educational institution involved grants credit for the course with full knowledge that it has been repeated.

Occasionally a firefighter may attend a course, the title of which is not included on the list of approved courses but which would otherwise qualify for approval. In such a case, the official title, course description, and name of the educational institution must be submitted to the Training Section in the Personnel Department, who will determine the course's qualifications under this policy.

The bonus plan shall consist of a payment of \$20 per semester unit, (quarter units to be computed at two-thirds value of semester units), not to exceed \$120 per fiscal year, for each firefighter successfully complying with this policy.

B. RESPONSIBILITIES

The Fire Chief is responsible for:

1. Ensuring that personnel listed on the Special Payment Demand are fully qualified to receive the bonus.

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RESPONSIBILITIES (continued)

2. Checking listed courses and matching them with the list of courses which appear to qualify otherwise but which do not appear on the list.
3. Submitting a copy of each certificate of completion to the Director of Personnel for insertion in the applicable personnel files.
4. Maintaining for review by the City Auditor a clear record of bonuses requested and received.

C. PAYMENT PROCEDURE:

RESPONSIBILITY	ACTION
Employee	1. Present a copy of certificate of successful course completion or other adequate proof of successful course completion to the Fire Chief.
Fire Chief	2. Prepare a Special Payment Demand. Attach documentation verifying successful completion to Special Payment Demand and forward to Finance Department.
Finance Department	3. Process Special Payment Demand in accordance with established procedure.